# Project Management Plan
## Instructional Template

---

**Note to the Reader**

You are encouraged to tailor the template and make additions or subtractions, as your professional judgement deems necessary. Through this activity, keep in mind that this document is central to a successful project and requires thoughtful deliberation, meaningful participation and careful documentation.

While using this template, please be aware that *plain, Italicized text* indicates instruction, direction, or a suggestion.

---

# I. OVERVIEW

This Project Management Plan (PMP) provides a roadmap for developing and executing the <project name> Project. It addresses the strategies, roles, responsibilities, plans, milestones, and issues appropriate to the project office's management activities, and it identifies the impact of the project on the TRICARE Program.

*Are there any unique characteristics about your project that you would like to highlight?*

# II. OBJECTIVE

*Define the overall project objective. This can be a one or two sentence description of your projects overall mission.*

# III. SCOPE

*Describe, in general terms, the project scope, i.e. the boundaries of the project. For example, is the project limited to an MTF, is it DoD/MHS-wide or is it interagency. Also, list the names of other projects that may be impacted by this project.*

*Information for the objective and scope should be consistent with what is found in the Mission Needs Statement for this project*
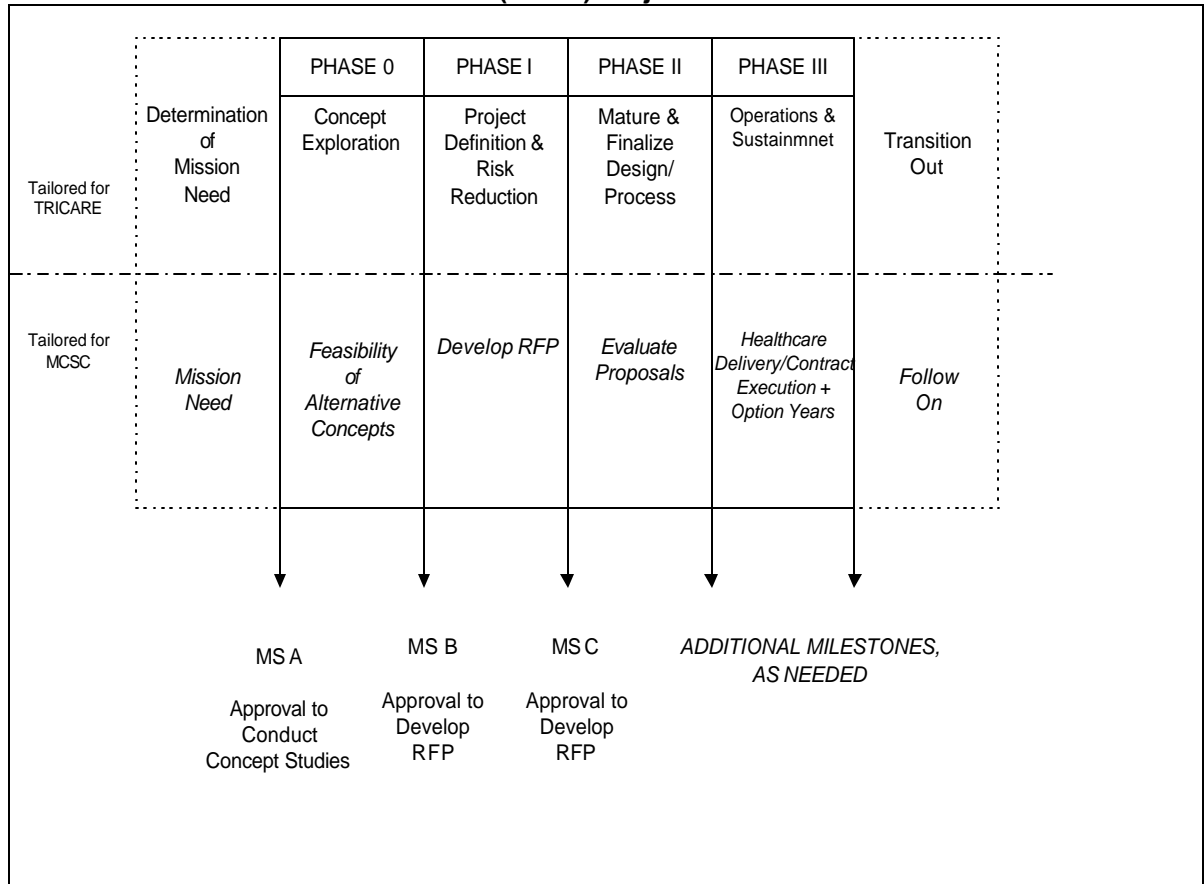
# IV. PROJECT STRATEGY

The major activities of the Project will be implemented in a series of four phases:

| | |
|---|---|
| Phase 0 | Concept Exploration |
| Phase I | Project Definition and Risk Reduction |
| Phase II | Mature and Finalize Design and Processes |
| Phase III | Operations and Sustainment |

Figure 1.0, Project Milestones, illustrates the "cradle to grave" concept of milestones and the tailoring of DoD 5000.

*The phases and milestones of a Managed Care Support (MCS) Project are included to provide some insight into the tailoring process as well as to illustrate the inherent flexibility with the management model. Figure 1 needs to be tailored and some phases may be combined or not applicable.*

**Figure 6**
**Tailoring the DoD 5000 Managed Care Support**
**Contract (MCSC) Project**

| | | PHASE 0 | PHASE I | PHASE II | PHASE III | |
|---|---|---|---|---|---|---|
| Tailored for TRICARE | Determination of Mission Need | Concept Exploration | Project Definition & Risk Reduction | Mature & Finalize Design/ Process | Operations & Sustainmnet | Transition Out |
| Tailored for MCSC | *Mission Need* | *Feasibility of Alternative Concepts* | *Develop RFP* | *Evaluate Proposals* | *Healthcare Delivery/Contract Execution + Option Years* | *Follow On* |

MS A

Approval to Conduct Concept Studies

MS B

Approval to Develop RFP

MS C

Approval to Develop RFP

*ADDITIONAL MILESTONES, AS NEEDED*

The strategies, plans and activities required to establish the project will be consistent with the overall TRICARE Program goals and guiding principles, as detailed in the TRICARE Program Management Organization Users' Guide.

- *In which phase are you beginning the project?*
- *Will your project proceed through all of the phases?*
- *How will you tailor the DoD 5000 phases to meet the needs of your project?*
- *What are the major milestones for your project?*

## A. MANAGEMENT APPROACH

*The following is offered as boilerplate text. If specific reporting or oversight direction has been provided, you should add it to this section.*

The management approach for the Project will follow a tailored version of the management model detailed in DoD 5000.2R, Mandatory Procedures for Major Defense Acquisition Programs (MDAPs) and Major Automated Information System (MAIS) Acquisition Programs. The DoD 5000.2-R management process is structured in logical phases separated by major decision points called milestones. The process begins with the identification of broadly stated mission needs and translates those needs into a stable, affordable, well-managed project.

At project initiation and after approval of the mission need, the Project Manager (PM) will propose for consideration to the PEO/MDA: the appropriate milestones, the level of decision making for each milestone, and the documentation for each. Changes and recommendations will be coordinated among the PEO/MDA, the Director of PM&I Office, and the Project Manager and subsequently incorporated into the Project Management Plan (PMP). This plan will be submitted to the PEO/MDA for final approval.

In addition to this structured, yet tailored approach, key tenets of the DoD 5000.2-R acquisition management model will be used to integrate essential cross-functional disciplines to optimize project decisions. The cross-functional IPT stakeholders will execute the project. When possible, the IPT will use a consensus decision making process.

## B. MIGRATION STRATEGY (if applicable)

- *Has this requirement been provided in another capacity?*
- *If so, how will you transition implementation to the new design?*
- *Will there be impacts on current systems, procedures, policies, etc.?*

*If the requirement met by the project is currently being provided, describe the process necessary to migrate to the new solution. Identify elements that will be affected by this change (such as information systems). Describe how you plan to move the requirement from the old to the new process.*

*If this is a brand new requirement, not being fulfilled by any other mechanism, this section is not applicable.*

## C. ACQUISITION STRATEGY (if applicable)

*The following questions should be considered when developing this portion of the Project Management Plan. Keep in mind that this is not a detailed Acquisition Plan. An Acquisition Plan may be necessary; however, it will be detailed later.*

*This section is meant to be the overarching strategy. The following questions may prove useful in getting started.*

- *Is a non-material solution available? Will a policy change meet the requirements?*
- *Do existing contracts exist that are potentially in scope, e.g., indefinite delivery/indefinite quantity contracts, contracts accessible through GSA Schedules, etc.?*
- *Is the DoD authorized to use these existing contracts?*
- *When will a detailed Acquisition Plan be drafted?*
- *Who will prepare the Acquisition Plan?*
- *Will an Acquisition WIPT be established for other activities? If so, who is required to participate as a member?*
- *Are there legal issues that need to be resolved?*
- *Is the value of the work large enough to require formal source selection procedures?*

## D. PROJECT INTEGRATION

The PM&I Office is responsible for compiling and analyzing information from all of the TRICARE Programs. PM&I will build and maintain systems that will store all documents, schedules and data for all projects, enabling the TRICARE PEO and Director, PM&I to:

- Identify opportunities for project collaboration when desirable;
- Identify the program's impact on TRICARE; and
- Identify the program's impact on the overall TRICARE Program.

The Director reports regularly to the TRICARE PM on the interrelationships, schedule conflicts, project status, etc.

*If you know of any existing integration, please provide a list and description of how your project will affect/depend upon/interact with, etc. the other projects. The tools that are used for integration, such as Primavera and the Integration House, should also be mentioned.*

## V. DATA STANDARDS

*The following questions should be used as a starting point to document this section:*

- *Will the project impact any existing information systems, e.g., CHCS, DEERS?*
- *Will the project require a new information system?*

- *Are there any Health Insurance Portability & Accountability Act (HIPAA) standards that apply to my project?*
- *Will any data be considered confidential? Classified?*
- *Are there any special reporting requirements, e.g., GAO?*
- *Have you coordinated new technical requirements with the Functional Integrated Workgroup (FIWG) within the Information Management, Technology and Reengineering (IMT&R) Directorate?*

## VI. CAPABILITIES REQUIREMENTS

*Identify the program's required operational capabilities in terms of performance parameters or functional requirements. Articulate requirements in operational, output-oriented, and measurable terms, i.e., metrics, project performance parameters. If possible, specify each performance parameter in terms of a minimum acceptable value (threshold) required to satisfy the mission need. Objectives for each performance parameter should represent a measurable, beneficial increase in capacity or operations and support, above the threshold value. The timing of requirements should specify the time-based nature of the need and any events that are driving the need.*

- *What means will be employed to measure the success of your project? What are your project metrics?*
- *Are there standards to which the project must adhere?*

*Key Performance Parameters (KPPs) are system capabilities or characteristics considered essential for successful mission accomplishment. Failure to meet KPP thresholds may cause the project to be reevaluated or terminated. Below are steps to one methodology for developing KPPs:*
- *List required capabilities for satisfying the mission need;*
- *Prioritize these requirements;*
- *For each function, build one measurable performance parameter;*
- *Determine the parameters most critical to project success and designate as the KPP.*

## VII. SCHEDULE OF ACTIVITIES

*Insert a schedule that identifies high level tasks to be completed. Also identify the major milestones, as well as the exit criteria for each milestone. Information in this section should complement the project Milestone Chart.*

## VIII. RESOURCE REQUIREMENTS (if known)

### A. LABOR

*List the labor requirements to complete each phase of the project. Provide information in hours, person years, or full-time employees (FTEs) and break out by labor category such as senior project analyst, clinician, data processor, etc.*

- *Is special assistance needed during the PMO process, e.g. business case analysis, etc.?*
- *What staffing will be required to sustain the project after implementation?*

### B. FUNDING

- *What is the required funding for the project by phase?*
- *Has funding been approved for Project Implementation?*
- *What funding stream has been identified?*
- *Have appropriate documents, e.g. POM Fact Sheets, Form 789, been submitted for action?*

# IX. RISK ASSESSMENT

### A. TECHNICAL RISKS

*Identify technical risks associated with incorporating the Project into the overall TRICARE Program. These risks may include the technologies necessary to incorporate the project into the Information Systems currently in place. This section should also address risk mitigation efforts that will be undertaken. Typical technical risk mitigation actions may include system change reviews and analysis. Other technical risks may involve aligning Managed Care Support Contractors' business practices and contracts with the new requirement.*

### B. PROGRAMMATIC RISKS

*Identify the risks associated with obtaining and using resources, including personnel resources and funding resources, to support activities under the control of the PM. Include the subsequent risk mitigation efforts.*

### 1. Cost Risks

*Identify the cost risks related to instability in project growth, programmed funding cycles, and costs driven by the marketplace. Potential mitigation strategies include cost and budget metrics, requirements, stability and growth metrics, realistic cost estimations, and routine analysis of the marketplace influences on the program's progress.*

## 2. Schedule/Performance Risks

*Identify schedule risks associated with schedule slippage within the project life cycle and in related projects.  Mitigation strategies include schedule metrics, use of incremental development and delivery activities, and application of realistic estimation processes for planning project activity.  Performance risks include those associated with the contractor performance and the ability to meet the performance expectations or the project requirements.  Contractor Performance/Client Satisfaction involves client support, performance, and reliability.*

# X.  APPROVALS:

| | |
|---|---|
| **Project Manager** | **Date** |

| | |
|---|---|
| **Co/Deputy Project Manager (if applicable)** | **Date** |

| | |
|---|---|
| **TRICARE Program Executive Officer** | **Date** |